



*48<sup>th</sup> Annual Midwest-Midsouth*

# ESTATE PLANNING INSTITUTE

July 29 & 30, 2021

*Attend In-Person at the Historic Keeneland Racecourse  
or Virtually via Zoom Livestream!*

**13.75 Hours of CLE Credit, Including 2 Hours of Ethics**

# 48<sup>th</sup> Annual Midwest-Midsouth Estate Planning Institute

THURSDAY, JULY 29, 2021

- 7:30 a.m. REGISTRATION TABLE OPENS / CONTINENTAL BREAKFAST
- 8:20 a.m. WELCOME AND ANNOUNCEMENTS
- 8:30 a.m. NOTABLE DEVELOPMENTS IN ESTATE PLANNING & ADMINISTRATION  
Turney P. Berry, Wyatt, Tarrant & Combs LLP  
Charles A. ("Clary") Redd, Stinson LLP
- 9:40 a.m. MORNING BREAK
- 9:55 a.m. DIRECTED TRUSTS TO HELP FAMILIES REDUCE FIDUCIARY FRICTION & MINIMIZE RISK  
Susan D. Snyder, Northern Trust
- 10:55 a.m. PICKING UP THE PIECES: POST-DIVORCE PLANNING  
Charles A. ("Clary") Redd, Stinson LLP
- 11:45 a.m. LUNCH BREAK  
SPONSORED BY COMMUNITY TRUST & INVESTMENT COMPANY
- 12:35 p.m. THE SECURE ACT AND OTHER RECENT DEVELOPMENTS IN ESTATE PLANNING FOR RETIREMENT ASSETS  
Robert K. Kirkland, Kirkland Woods & Martinsen LLP
- 1:35 p.m. LESSONS LEARNED FROM CHARITABLE REMAINDER TRUSTS: THE MYRIAD METHODS OF MESSING UP CRTS  
Kelly Hellmuth, Holland & Knight LLP
- 2:25 p.m. AFTERNOON BREAK  
SPONSORED BY CENTRAL BANK & TRUST CO.
- 2:45 p.m. LEGAL ETHICS ISSUES IN CHARITABLE PLANNING  
Turney P. Berry, Wyatt, Tarrant & Combs LLP  
Bruce M. Stone, Goldman Felcoski & Stone, P.A.
- 3:45 p.m. CRUCIAL "END OF LIFE" DOCUMENTS: A NUTS & BOLTS DISCUSSION  
Edward J. Buechel, Buechel & Conley, PLLC  
Joseph A. Rectenwald, St. Elizabeth Healthcare
- 4:45 p.m. RECESS INSTITUTE

## 2021 Institute Sponsors & Exhibitors

- Argent Trust Company
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- Bluegrass Community Foundation
- Central Bank & Trust Company
- Christie's
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- Community Foundation of Louisville
- Community Trust & Investment Company
- ElderCounsel
- Foundation for Appalachian Kentucky
- Glenview Trust Company
- Hilliard Lyons Trust
- KBA Probate & Trust Law Section
- Krause Financial Services
- PNC Wealth Management
- Sotheby's

FRIDAY, JULY 30 2021

- 7:30 a.m. CONTINENTAL BREAKFAST
- 8:00 a.m. THE PAST YEAR'S MOST SIGNIFICANT, CURIOUS, OR DOWNRIGHT FASCINATING FIDUCIARY CASES  
Dana G. Fitzsimons Jr., Bessemer Trust
- 9:00 a.m. JUST BECAUSE YOU CAN DOESN'T MEAN YOU SHOULD – NAMING THE DRAFTING LAWYER AS EXECUTOR OR TRUSTEE  
Steven A. Benefield, *phelps*
- 10:00 a.m. MORNING BREAK
- 10:15 a.m. A KENTUCKY PRACTICE NUTS & BOLTS SURVEY OF ESTATE PLANNING/ ADMINISTRATION ISSUES  
Moderator: James C. "Jim" Worthington, Sr., Worthington Law Firm  
Panelist: Scott A. Weinberg, Lynch, Cox, Gilman, & Goodman P.S.C.  
Panelist: Jeffrey L. Gehring, Dickinson Wright PLLC  
Panelist: Katherine P. Langan, Stoll Keenon Ogden PLLC
- 11:15 a.m. GENETIC TESTING AND ITS IMPACT ON ESTATE PLANNING AND ADMINISTRATION  
Katie Lynagh, Milbank
- 12:15 p.m. LUNCH BREAK  
SPONSORED BY ARGENT TRUST COMPANY
- 1:00 p.m. LEGAL ISSUES IN PASSING CORPORATE AND PARTNERSHIP INTERESTS  
Stephanie McGehee-Shacklette, Berry & McGehee PLLC
- 1:45 p.m. FOG AND CONFUSION: MODIFYING IRREVOCABLE TRUSTS  
Douglas A. Bozell, Douglas A. Bozell PLLC
- 2:30 p.m. AFTERNOON BREAK
- 2:45 p.m. FLIPPING THE SWITCH ON AND OFF – GRANTOR V. NON-GRANTOR TRUSTS  
Melanie L. McCoy, Frost Brown Todd LLC
- 3:30 p.m. INSOLVENCY ISSUES IN ESTATE ADMINISTRATION  
Ashley D. Gerughy, Berry & McGehee, PLLC
- 4:15 p.m. ADJOURN INSTITUTE

## REGISTRATION & CANCELLATION INFORMATION

Pre-registration is strongly recommended. If you cancel, a full refund of tuition (less \$50 administrative charge) is given up to 4:30 p.m. EST, July 22, 2021. Registrants who cancel may still request course materials. If requested, course materials will be emailed after the seminar and the cost will be deducted from any refund. **No refunds are available for cancellations after the deadline;** however, materials will be emailed immediately in full consideration for tuition paid. Registrations are transferable and substitution of registrants may be made any time before the seminar begins.

## CONFERENCE LOCATION & ACCOMMODATIONS

The conference itself will be held at the historic Keeneland Racecourse Sales Pavilion in the bluegrass region of Kentucky, located at 4201 Versailles Road in Lexington, Kentucky. Hotel rooms for conference participants have been blocked at 21c Museum Hotel Lexington, located at 167 West Main Street. The block is from July 28 through July 29, 2021. Rooms will be held until June 29, 2020, **or until sold out**, at the rate of \$159 per night. Reserve rooms directly with the hotel online at <[tinyurl.com/EstatePlanning2021](https://www.tinyurl.com/EstatePlanning2021)>. Registrants will need make arrangements to travel from the hotel to Keeneland and back.

## REMOTE ATTENDANCE OPTION

This Institute will offer the option of attending virtually via live-streamed video. Instructions will be provided if you select this option on the registration form. You will need stable, high-speed internet access and a computer, laptop, tablet, or other mobile device.

## COVID-19 SAFETY PLAN

If it is deemed unsafe to hold this Institute in person, please note that it will be offered as a live, interactive Zoom Webinar on the same dates and following the same agenda times. We will notify registrants of this change as soon as is practicable. See registrant cancellation policy above.

Enroll now for this summer's Institute, covering critical issues for estate planning and administration professionals.

The University of Kentucky College of Law Office of Continuing Legal Education takes pride in presenting authoritative, practical programs in estate planning and estate administration. Join the loyal group of participants who register for this mid-summer program every year. Each July, a distinguished regional and national faculty contribute writings and discussions to update you on essential topics, explore new areas and provide fresh, practical analyses for the complexities of modern estate planning practice.

**UK/CLE's Annual Estate Planning Institute:**

The oldest tradition in estate planning & The longest-running annual CLE event in CLE in the Midsouth. the Commonwealth.

## INSTITUTE CO-CHAIRS

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UK/CLE wishes to thank the KBA PROBATE & TRUST LAW SECTION for its annual sponsorship of funds toward out-of-state speaker expenses.

# 48<sup>th</sup> Annual Midwest-Midsouth Estate Planning Institute

Thursday, July 29 & Friday, July 30, 2021

I would like to attend the Institute in-person at Keeneland, and:

I would like the course materials in **hard-copy** format. I enclose conference tuition of **\$445**.

I would like the course materials in **PDF** format. I enclose conference tuition of **\$379**.

*I understand that for safety reasons, the Institute may be moved to the webinar format depending on circumstances surrounding the COVID-19 pandemic.*

I would like to attend the Institute remotely via a live video stream with the course materials in **PDF format**.

I enclose conference tuition of **\$379**.

I can not attend the Institute, but would like to purchase the course materials:

I would like the course materials in **hard-copy** format. I enclose **\$99**. (Ky. residents add 6% sales tax for a total of \$104.94.)

I would like the course materials in **PDF** format. I enclose **\$79**. (Ky. residents add 6% sales tax for a total of \$83.74.)

**TO PAY BY CREDIT CARD:** Call us at (859) 257-2921 and we can take your order and credit card information in one step. We can accept Visa, MasterCard, AmEx, or Discover.

**TO PAY BY CHECK:** Mail this form with your check, made payable to the University of Kentucky, to our office: UK Office of Continuing Legal Education, 660 South Limestone, Lexington 40506-0417. A \$25.00 fee will be charged for all returned checks. USPS First Class Mail may take up to 14 days to arrive.

NAME

FIRM / AFFILIATION PHONE

STREET AND MAILING ADDRESS E-MAIL ADDRESS (required)

CITY STATE ZIP CODE